Commonwealth of Massachusetts
Executive Office for Administration and Finance
Information Technology Division

Policy Area: Application/Application Development	**Policy #:** ITD-APP-02
Title: Enterprise Information Technology Acquisition Policy	**Effective Date:** January 13, 2004

Issue Statement

The Commonwealth has a responsibility to ensure that information technology solutions are selected based on best value after careful consideration of all possible alternatives including proprietary, public sector code sharing[1] and open source solutions. The purpose of this policy is to ensure that those solutions that may not be otherwise represented by IT vendors during the procurement process are identified and evaluated by agencies as part of their best value selection of IT solutions.

Major terms used in this policy are defined as follows:

Best Value: The Commonwealth's procurement philosophy that states that it is in the best interest of the Commonwealth for solicitation evaluation criteria to measure factors beyond cost. Please see the Procurement Policies and Procedures Handbook (http://mass.gov/agency/documents/osd/policy/phand.pdf) for a more complete definition of Best Value. For IT investments, a best value evaluation should, at a minimum, consider total cost of ownership over the entire period the IT solution is required, fit with identified business requirements, reliability, performance, scalability, security, maintenance requirements, legal risks, ease of customization, and ease of migration.

Proprietary Software: Software typically subject to a use fee under a license that limits access to and modification of the underlying source code, and restricts redistribution to others.

Open Source Software: Refers to software whose underlying code is available for inspection and modification by the licensee, may be available for re-distribution and may be deployed without a license fee.

Public Sector Code Sharing: Software code that is owned by a public entity and is made available to other public entities for use and modification without royalties.

Applicability

Agencies within the Executive Department and vendors providing information technology goods and services to these agencies must comply with this policy.

Commonwealth's Position

- IT investments should reduce the total cost of ownership to the Commonwealth while maximizing flexibility and reuse.

- IT investments should facilitate the consolidation of platforms that provide the highest flexibility and scalability in order to achieve best value and economies of scale while meeting business requirements.

Policy Statement

- Agencies must conduct a best value evaluation for IT investments. This evaluation should

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[1] It is the Commonwealth's intent to develop a mechanism to facilitate public sector code sharing in 2004.

consider, at a minimum, total cost of ownership over the entire period the IT solution is required, fit with identified business requirements, reliability, performance, scalability, security, maintenance requirements, legal risks, ease of customization, and ease of migration.

- For all prospective IT investments, agencies must consider as part of the best value evaluation all possible solutions, including open standards compliant open source and proprietary software as well as open standards compliant public sector code sharing at the local, state and federal levels.

Roles and Responsibilities

Information Technology Division

- Provide guidance and consultation to agencies on solution alternatives.

- Facilitate public sector code sharing efforts.

Agencies

- Ensure compliance with this policy for all prospective IT investments by conducting a best value evaluation of all possible solutions, including open standards compliant open source, proprietary and public sector code sharing solutions.

- When considering open source alternatives and public sector code sharing consult with ITD's General Counsel regarding the rights and responsibilities conferred by the particular open source license or code-sharing agreement associated with the solution.

- Identify potential candidate code owned by the Commonwealth for sharing among public entities.

Compliance

- ITD will review all agency IT Investment Briefs, project plans and service requests for compliance with this policy before granting approvals.

- ITD will review agencies' due diligence efforts to evaluate all possible IT solution alternatives as part of its ongoing project review and oversight processes.

Related Documents

- Enterprise Open Standards Policy

- Enterprise Technical Reference Model Version 1.0

- Open Source License Legal Toolkit [to be published during the first quarter of 2004]

Points of Contact

Questions or comments related to this policy should be directed to Standards@state.ma.us. The Director of Policy and Architecture, Information Technology Division will respond to all questions.